ACS Technologies®

Membership PLUS® Version 11

Getting Started Guide

Getting Started Guide for Membership Plus Version 11

License to Use

Licensor agrees to supply certain documentation and those computer program(s)/software specified on the ORDER form, and incorporated herein by this reference, for purchaser's sole use in consideration of the price specified on the said order form. Product(s) is/are understood to be that/those described in promotional material received from the licensor, ACS Technologies Group, Inc. (ACS)

Term & Title

The term of the license granted herein is perpetual.

Purchaser hereby acknowledges that the computer program(s)/software, including without limitation, the design thereof, documentation and other information relating thereto are trade secrets and continue to be proprietary to the licensor. Purchaser agrees not to take any actions, which might encumber or expose the computer program(s)/software to any claims, transfers, conversion or other forms of encumbrance.

Grant of License

Licensor hereby grants a nontransferable, nonexclusive license to use the computer program(s)/software in accordance with the terms of the agreement. If any terms herein contained are breached, licensor may terminate this agreement, recover possession of the computer program(s)/software and collect all amounts due hereunder. Said use is restricted to a single address of purchaser, as stated above, and use at any other site must be authorized by another agreement or amendment to this one. Unauthorized use of any computer program(s)/software, documentation or trade secrets will automatically obligate purchaser to pay the established license fee for each such usage. If unauthorized use is intentional and performed by Purchaser, its agents, employees or members an added penalty of three times the applicable license amount shall be due in addition to other equitable relief or injunctive action allowed by law.

Product Definition

The terms "product" and "computer program(s)/software" shall include all programs and associated or related documentation provided by licensor to purchaser, including by way of illustration but not by limitation, tapes, cassettes, diskettes, manuscripts, CDs, user guides, explanatory material, demonstration material and all enhancements, improvements or modifications thereof.

Payment

Purchaser agrees to pay all fees set forth on the order form, denoted "Total Order." Said
"Total Order" is understood NOT to include taxes unless otherwise indicated on the Order Form. Purchaser agrees to pay all federal, state and local sales, use, property, excise, or other taxes imposed on or with respect to the purchase of the product, either with initial payment, or upon receipt of an invoice for the same. Upon acceptance of this agreement by licensor, all computer program(s)/software will be shipped FOB Florence, SC to purchaser. Notwithstanding, in the event said computer program(s)/software are returned to licensor in accordance with Paragraph 10 hereof, any such return does not reduce, eliminate or obviate covenants contained in this agreement nor cancel this agreement. Additionally, all costs of freight, transfers, insurance, duties or other expenses incurred in the transportation and shipment of the computer program(s)/software, shall be borne by purchaser as well as any costs for installation and/or training received as billable.

Delivery

Licensor covenants that computer program(s)/software will be delivered within a reasonable period of time from date of order. Typical delivery is within two weeks of Licensor's receipt of the order. Delivery date commitments on special order items are subject to unavoidable delays.

Non-Disclosure

Purchaser hereby recognizes the licensor's proprietary interest in the computer program(s)/software, related trade secrets, methods of expression, processes and in all materials in whole or in part associated with this agreement. Purchaser agrees not to communicate during the term of this agreement or at any time thereafter, any information relating to the secrets which purchaser might from time to time acquire pertaining to the business of licensor, unless authorized in writing by licensor. In the event of a violation of this covenant, purchaser shall be subject to the provisions as stated in Paragraph 8.

Breach and Termination

In the event of breach of agreement by Purchaser, Purchaser shall:

Immediately cease to have any rights to the use of computer program(s)/software; Return all copies of computer program(s)/software and verify by written affidavit that all copies of computer program(s)/software for which purchaser is responsible have been returned; Reimburse licensor for all costs incurred because of breach of this agreement, and be subject to such damages as may be allowed by the law, including the costs of enforcing the terms of this agreement, and punitive damages, if applicable; Reimburse licensor for all profits lost as a result of the unauthorized distribution of said computer Program(s)/software, if such has occurred. Licensor may terminate this agreement and the license in whole or in part if the purchaser shall breach or fail to perform any obligation or condition of the license agreement.

Warranties/Limitation of Liability

Licensor warrants the computer program(s)/software to operate as specified in the documentation and promotional material. The foregoing warranties are in lieu of all other warranties expressed or implied, including without limitation, the implied warranties of merchantability and fitness for a particular purpose. Under no circumstances shall licensor be responsible for consequential damages, lost profits, or other special damages, even if licensor has been advised of the likelihood of same.

Acceptance Tests

Purchaser shall have thirty (30) days from receipt of the program(s)/software to perform acceptance tests. If in the Purchaser's sole discretion, program(s)/software fail(s) to pass such acceptance tests, purchaser shall promptly (but in no event later than the expiration of such 30 days), report such failure to ACS in writing. In such event, purchaser shall either:

Continue to use the program(s)/software under the terms and conditions of this agreement, Return to ACS within five (5) business days following expiration of said 30 day test period, the original and all copies of the program(s)/software together with all components thereof, all operating manuals and other related materials, and all notes concerning and reproductions of and relating to such items in accordance with Paragraph 5 of this agreement. If option B above is justifiably exercised, a full refund of all license fees received by licensor shall be immediately mailed to Purchaser.

NOTE: Licensor shall not be held responsible for refunding any amount paid by Purchaser, which shall have been retained by a dealer of the products, which was not therefore received by Licensor. If a reseller sells the products to Purchaser, Purchaser shall, if desired, procure equal protection of amounts paid but not retained by Licensor directly from the reseller.

Warranty of Title

Licensor warrants that it holds title to and/or copyrights to all software sold and delivered pursuant to this agreement, and that it conveys good title for all software sold. Licensor represents that title to certain programs in the software is held by other entities, the developers of said software. With respect to these programs, licensor warrants that it holds a valid license from said entities to relicense the use of said software, and to make all representations and warranties provided in this agreement with respect to said software.

Miscellaneous

This agreement is made in, governed by, and the performance thereof shall be construed in accordance with the laws of the State of South Carolina. Severability. If any provision of this agreement shall be held invalid, illegal, or unenforceable, the validity, legality, and enforceability of the remaining provisions shall in no way be affected or impaired thereby. Merger of Integration. Purchaser represents to have read this agreement and is in agreement with all of the terms and conditions herein. Purchaser agrees to be bound by the terms hereof and also agrees that this is the complete and exclusive statement of contract between purchaser and licensor, and that no verbal or other written communication supersedes or modifies this agreement. Disputes. In no event shall licensor's liability rising out of or based upon this agreement, regardless of the form in which any legal or equitable action may be brought, including without limitation, any action in tort or contract, exceed the license fee paid by purchaser to licensor. Any such action or proceeding shall be brought in a federal or state court of competent jurisdiction in the State of South Carolina, and in no other jurisdiction.

Licensor:

ACS Technologies Group, Inc.
Post Office Box 202010
Florence, SC 29502-2010
1-800-736-7425

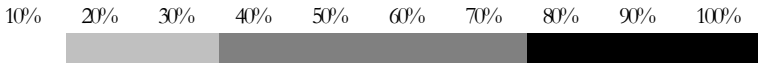


Table of Contents

Installation Instructions 5
- Single User Install 5
- Network Install 6
- Product Registration 6

Converting Data from Previous Versions 7
- Conversion Process 7
- Converting from another Church Management system or software 8

Before You Begin 9
- Background and Planning 9
- Analyzing Your Organization and Gathering Data 9
- Getting Started Tips 9

Entering Data 11
- Entering Data All at Once 11
- Entering Data As You Need It 11
- Practicing with Sample Data 12

Starting Membership PLUS 13
- To Open Membership PLUS 13
- Selecting the Program User and Data Set 14
- Membership PLUS Welcome Screen 14

Program and Data Set Properties (Defaults) 15
- Program Properties 16
  - General 16
  - Default Data Set Path 16
  - Sample Data Set Path 16
- Data Set Properties 17
  - International 17
  - Members 17
  - Groups 19
  - Meetings 20
  - Visitation 20
  - Financials 20
  - Organization 20

Membership PLUS Modules-Members & Financials 21
- Module Basics 21
- Module Pages (Tabs) 22
- Working with Records 23

Membership Tracking 24
- Families, Individuals, Organizations 24
- Member Browser 24
- Groups 25
- Small Groups 25
- Visitation 25
- Member Notes 26
- Member Pictures 26

Financial Tracking 27
Contributions and Pledges 27
Deposits 27
Banks 27
Funds 28
Contributions @ Home 28

Accounting 28

Membership PLUS Modules – Schedule, Surveys, Workflow 29
Module Pages (Tabs) 29
Working with Records 30

Schedule and Resources Tracking 31
Meetings 31
Auto Tasks 31
Event Registration 31
Calendar 31
Room & Equipment Scheduling 31
Equipment Inventory 31

Survey Module 32

Workflow Wizard Module 32

Reporting 33
Report Generator 33
Quick Letter 34
Pictorial Directory 35
Progress Tracker 36

Administration Modules 37
Program Properties 37
Global Search & Replace 37
Policies & Procedures 37

Membership PLUS QuickView 37

Program Help 38

Installation Instructions

Single User Install

In order to install and operate Membership PLUS successfully, your computer system must meet the following minimum requirements.

Single System Requirements

- Windows XP or Vista
- CD-ROM or DVD drive
- Pentium IV or greater
- 256 MB of RAM or greater
- 1 GB hard drive space
- 600 x 800 monitor display. 64K color or greater

Installation Instructions

First, start Windows, if it isn't already running. Close any other programs you have open, including screen savers, and disable antivirus programs. This will make the setup process go more smoothly and quickly.

Note: if you intend to use Membership PLUS over a network, be sure to read the next section for network install.

1. Place the CD in your CD drive. The setup program launches automatically. If the setup fails to start after a few moments, follow these instructions.

2. Click the **Start button** and choose Run.

3. Type X:\deluxeinstall.exe (Deluxe edition) or X:\standardinstall.exe (Standard edition) in the Run dialog box, where X is your CD-ROM drive letter. Then click OK.

Once started, you will see the Membership PLUS Version 11 Installation Screen. This screen provides you the opportunity to install Membership PLUS Version 11, access the Getting Started Guide on line, register your product and download the Adobe Reader for viewing Membership PLUS electronic documentation. After selecting to Install Membership PLUS Version 11, read the License Agreement terms and proceed with the instructions on the screen. During the installation, you'll be prompted to select which locations you wish to install the program. Your choices will vary, depending upon computer/network environment but it is recommended that you accept the default installation settings.

Setup Instructions

When all program files have been installed, you can view a README file that contains troubleshooting or other information not available when the other documentation was completed. (To view the README file at a later time, choose the appropriate icon in the program group where Membership PLUS was installed.)

Network Install

Whether you are a single organization with just a few computers or a large organization with LANs, WANs, and multiple sites, Membership PLUS is capable of providing the same powerful functionality throughout your network.

Network Server Requirements

- Windows Server 2000/2003/peer to peer with shared drive
- Pentium IV or greater
- 256 MB of RAM or greater
- 1 GB hard drive space

Using Membership PLUS on a Network

Membership PLUS allows multiple users to connect to the same database files via a network. For this multi-user capability, you will need to contact Membership PLUS Customer Service at 1-866-539-6391 to acquire a Multi User License and register as a network user. To set up Membership PLUS for use on a network, the following configuration is required.

- A central copy of the database(s) for the entire organization is stored on the network file server.
- Membership PLUS is installed on each client PC work station that needs to access the central database(s). **Note:** See Installation Instructions in the Single User Install section above.
- Individual users on client PCs connect to the central database(s) simply by selecting to open it at program startup.

It's very important that the same version of Membership PLUS is installed on each computer running the program. The term "same version" refers both to major revisions and minor revisions.

Note: After paying an additional fee, the Membership PLUS license statement allows the program to be installed on as many computers as your multi-user license allows when all are accessing the same database over a network.

Product Registration

If you purchased Membership PLUS directly from Membership PLUS/ACS Technologies, Inc., you are automatically a registered customer. If you purchased this product from a retail store, visit us at **www.memplushome.com/register**. We'll make sure you're registered which provides you with all the benefits of a registered user.

Registration entitles you to the following benefits:

- Notification of program revisions and upgrades.
- Announcements of other new products from Membership PLUS/ACS Technologies, Inc.
- Opportunity to enroll in the Membership PLUS Support PLUS program which offers a toll free support phone number and unlimited technical support.

Converting Data from Previous Versions

This section provides step-by-step instructions for converting data from versions 8.x, 7.x and 6.x of the program to Membership PLUS Version 11. The conversion process applies to individual data sets; each previous version data set must be converted separately.

Membership PLUS makes no attempt to correct corrupted data during the conversion process. If you have errors in your data in your current version, you'll have the same data errors in Version 11. If you have not performed data maintenance on a regular basis, you should use the diagnostic tools available in your current version of the program to check, verify, and repair any problems that may exist before converting your data to Version 11. Make a backup prior to performing these diagnostics; when you're satisfied with the condition of the data, make another backup before proceeding with the conversion.

Membership PLUS 2005 version 9.x and **Membership PLUS 2007** version 10.x does not require a data conversion.

Data conversion is required for **Membership PLUS versions 6.x, 7.x, and 8.x** and can be performed locally by the user.

Membership PLUS versions 5.x and earlier require a data conversion that must be performed by Membership PLUS Data Services. Please contact Membership PLUS Customer Service at 1-866-539-6391 for information about converting your data to Membership PLUS Version 11.

Conversion Process

The most important thing you should do before you convert your Membership PLUS data for use in Version 11 is create a backup copy of your data sets. The backup copy serves as a safeguard if any problem occurs during the data conversion process.

To begin the conversion process:

1. ***Start Membership PLUS***
2. ***From the Welcome Screen, select the data set under the Previous version you want to convert. If it's not listed, click the Browse button and use the directory selector to locate the data set you wish to convert.***
3. ***Click the Continue button.***

A conversion process log will appear on the screen as the Membership PLUS Version 11 conversion utility converts your data. If there are no problems with the conversion, the message **'Conversion Successful'** will appear upon completion.

The time necessary to convert your data depends on the size of your data set; please **DO NOT CANCEL THE CONVERSION PROCESS** as it may cause data damage.

Once data has been converted by Membership PLUS Version 11, you may not use that data with any prior version of Membership PLUS. If you think that you might want or need to return to a previous version temporarily, be sure to make a backup copy before you open the data set with Version 11.

Converting from another Church management system or software

If you've been using another church management system, you may be able to export the data from that product and import it into a Membership PLUS data set. Because of the differences between various programs, you will find that Membership PLUS keeps track of either more or less information than you have available in your prior program. This may require you to edit the data you want to import before you bring it into Membership PLUS. For example, you may have to edit the export file manually to create blank fields where Membership PLUS expects information not provided by your prior program. In some cases, you might decide that it is easier simply to re-enter the data into your new Membership PLUS data set than to try to automate the process.

Membership PLUS imports data for members (names, addresses, contacts, and dates), as well as groups and group membership. It does not import any meeting, attendance, or financial information. For that reason, it may be best to start fresh with the beginning of the calendar or fiscal year and retain your old program for historical information. You can go back and enter historical information into Membership PLUS as you find time.

Data Conversion Services are available to convert your data from a different program. Contact Membership PLUS Customer Service at 1-866-539-6391 for information and pricing.

Before You Begin

Background and Planning

It is very important that you take the time to study the module definitions and concepts presented in this guide. Understanding what Membership PLUS means when various terms are presented will give you a head start and allow you to make progress right away when you start using the program. Thinking about your church or organization's needs and planning will enhance your efficiency and the accuracy of your data.

Analyzing Your Organization and Gathering Data

Membership PLUS can manage a virtually unlimited amount of data about your members. Before you get started using the program, it would be to your advantage to think about the types of information that your organization currently tracks or would like to track.

Do you want to keep track of information about individual members and their families, individuals only, or families only? That decision affects the other data you will want to collect and have available when you sit down with Membership PLUS. If you only track families, for example, the marital status or birthdays of individuals aren't relevant to your needs but if you track individuals, those details may be necessary as part of the basic information that should be entered for everyone.

Unless your organization is just getting off the ground, you already have some sort of system in place for tracking information about your members. Whether it's another software program or a paper-based system, you can use it as a starting point for deciding what data you want to enter into Membership PLUS.

Getting Started Tips:

1. Review your current system and make a list of every piece of information you're tracking. Be sure to identify those items for which there are no "organized" ways to monitor the data
2. Analyze each item and decide if it's something you want to continue maintaining.
3. Finally, add to the list the information that your organization wants to start tracking. This could be information for which there was not a good place to record the data in your previous software, or items that are new to your membership. For example, if your church or group only recently set up an Internet email account, you may want to start gathering email addresses from your members so that you can communicate with them via email instead of regular mail.

Starting to use a new program like Membership PLUS provides a good opportunity to update records for all of your members. You need an organized procedure to collect up-to-date information from all your members so that you can enter it into the program.

One way to do this is to create a fill-in-the-blank member information form. The form should include space for each individual or family to record the information your organization wants to track. Distribute copies of the form to all your members and use them as the basis for entering initial information into the program.

Provide the form, or a modified version of it, to new members as they join your organization. You may want to redistribute the form to your entire membership periodically to gain updated information and keep your database current. (In fact, this is a good idea even if you've been using previous versions of Membership PLUS for years.)

Membership PLUS provides two simple example forms you can use as a starting point for designing your own form or use the forms as provided. Form 1 is for families and Form 2 is for individuals. Enter a requested return date and the name of the person who will be responsible for collecting the forms in the spaces provided. Make copies and distribute a form to every member in your church or organization.

The forms are located at www.memplushome.com/gettingstarted.

Entering Data

There are two strategies for manually entering your member information: doing it all at once, or doing it as you need it.

Entering data all at once (Using most features of Membership PLUS)

If you plan to use all or most of the features of Membership PLUS (reports, mailing labels, contribution tracking, and recording attendance), it is recommended to spend the necessary time entering all of your basic member information first.

Take the time to set up basic financial information, too. You'll need information about the banks your church uses, information about the accounts, categories, and/or classes used in your financial accounting system. Work with the person who does the accounting for your organization to set up this information in Membership PLUS.

Once all the relevant data has been entered into the program, you can focus on the details of contribution data entry, attendance tracking or reporting.

Entering data as you need it (Using Contributions primarily)

If your primary use for Membership PLUS is to track contributions, create new members as needed to enter their contributions.

When you get a check from someone who is not already in the data set, simply add that individual or family using the name, address, and phone information from his or her check. If you receive a cash contribution, you will need to retrieve the information from the individual if it is not provided with the contribution.

This approach may increase the time it takes to record the first few weeks' worth of contributions, but it may save some time in the end since you don't have to enter any information for anyone who is not a contributor. After a few weeks you can fill in the rest of the information about each contributor's family, alternate addresses, employers, and so on. This allows you to get started immediately with Membership PLUS without a lengthy data entry period.

You can use this same approach to define new funds. As you receive a contribution for a fund that is not yet in the data set, simply add the fund. Once you've saved the new fund record, you can proceed to enter the contribution.

Practicing with Sample Data

Membership PLUS can keep track of a lot of information that is important to the effective operations of your church or organization. Much of the data is sensitive data—phone numbers, social security numbers, contribution data, etc. It's important that all the data be entered correctly and as efficiently as possible. The background information you've gained and the planning you've done as a result of reading this manual will go a long way toward helping you make effective use of the features of Membership PLUS from the very beginning.

Membership PLUS provides sample data that you can use to view the program's features and functions. You can see examples of member, group, and financial data and generate sample reports to see what you can do with each piece of information. In addition you'll see examples of the kinds of "user-defined" fields and data that can be created and entered to customize the program for a church or other service organization.

If you want to practice entering data without jeopardizing your church or organization's data, you might want to create your own practice data set. Sometimes, using a small subset of your real data can provide a better indicator than the sample data and allow you to gain a better picture of how Membership PLUS can meet your church or organization's specific needs. You'll recognize your organization's members in the reports and you'll know where you entered the data and how it's used. You will see the differences between individual members, individuals linked to families, and "stand-alone" family unit members to decide which type(s) of member records make the most sense to your church or organization. Practice entering pledges and contributions so that you can see what information you need at what point in the data entry process for the most efficient entry. You can do all of this—and more—in a practice data set, gaining confidence in your understanding of the program's features without worrying about "damaging" your real data.

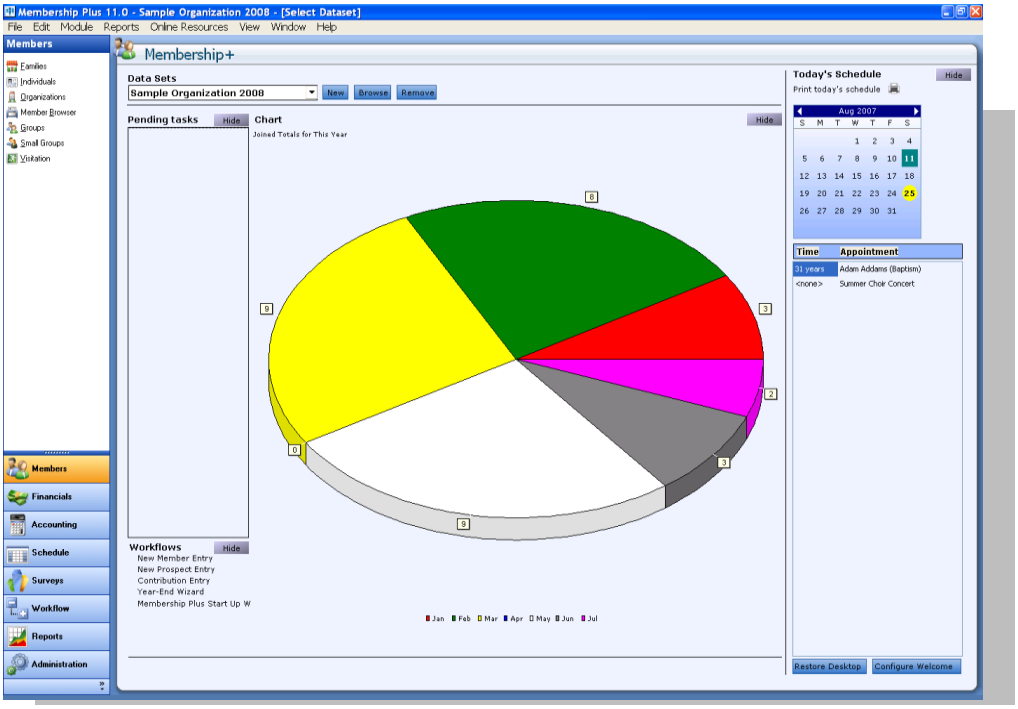
Information about creating and opening data sets is found in the following section.

Starting Membership PLUS

To open Membership PLUS Version 11:

1. Click the **Start button** in the Windows taskbar (normally located in the lower left corner of your desktop screen).
2. Choose Programs, and then choose the Program Group where you selected to install Membership PLUS Version 11. The default group is Membership PLUS.
3. Select Membership PLUS Version 11. .

Membership PLUS will open to the **Welcome Screen**. The Welcome Screen is structured to provide you quick access and "at-a-glance" information every time you start the program.



Each person who will be using the program should be entered as a user in **Access Setup**. Setting up users and their program rights will allow the following:

- To identify who modified a particular record.
- To limit access to certain areas of the program for some users, protecting confidentiality of the data related to your members.

Tip: Access protection is initially disabled. You need to enable their use for the data set. Only users identified as Administrator can set up access rights. Even if security and confidentiality are not an issue, it's a good idea to set up at least one Administrator, to use in case another user locks everyone out of the data set accidentally

Selecting the Program User and the Data Set to Open

From the Welcome Screen:

1. Identify yourself as the current user of the program.
    a. Select your name or role from the Access Name drop-down menu in the Access Rights window. If this is the first time you've logged into the program, select Administrator. There are no passwords set when the program installs however it is recommended that a password be setup for each user once you begin using the program.
2. Select the data set you want to open
    a. Locate the desired data set in the Data Sets drop-down. If your organization spans multiple locations you may want to have different data sets for each. Through the Welcome Screen, you can quickly and easily access those data sets.
    b. If you don't see your data set in the Data Set Drop-down, you can locate the database files by clicking the Browse button. This will allow you the opportunity to search your hard drive (or the network).

Membership PLUS Welcome Screen

This section will list and describe the information and options available on the Welcome Screen.

- **Module Selection Bar—**select the Membership PLUS module you would like to work with from the vertical button bar on the left-hand side of the Welcome Screen.
- **View "Today's Schedule."**—You can view today's events, birthdays, anniversaries, meetings and meeting time by looking at the event section on the right-hand side of the Welcome Screen. The Appointment will display what or who the information is about.
- **Pending Tasks**—Displays a list of tasks to completed. **Note:** Available only in Membership PLUS Deluxe.
- **Quick View Chart**—View graphs of contributions, attendance, member special dates, and progress toward organization goals.
- **Workflows**—The Welcome Screen provides a list of Workflow Wizards that you can launch quickly.
- **Customize the welcome screen**. If you want to see different information on your opening screen, click the **Configure Welcome Button**. From the Configuration Window, you can specify the graph (and its parameters) as well as the list of Workflow Wizards.

Program and Data Set Properties (Defaults)

Properties or default fields provide structure for your data entry or make the data entry process more efficient. If you have more than one data set, you can set up different defaults for each one, depending on the information that's appropriate for the relevant organization.

Defaults can be created or changed any time, but since they will affect the accuracy of your data and the efficiency of entering it, it's very important that you properly establish as many data set defaults as possible before you begin entering records.

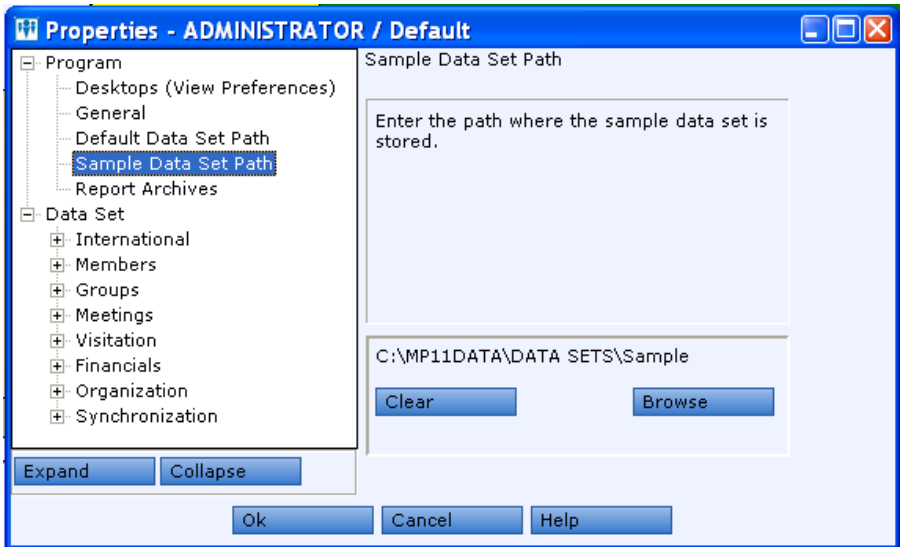
Specifying Program and Data Set Properties (Defaults)

There are two different types of properties or defaults that you can set up in Membership PLUS.

- **Program properties** refer to items that affect the way the program behaves or appears.

- **Data set properties** are items that provide structure for your data entry or make the data entry process more efficient. .

To set up properties for your data set and for the Membership PLUS program as a whole, choose **Properties** from the **File menu**.



The **Properties** dialog box provides an expanding/collapsing “tree” on the left, similar to My Computer in Windows. A PLUS (+) sign indicates that more branches are available; a minus (-) sign indicates that the tree is fully expanded. The information pane on the right corresponds to the selected “tree branch” on the left.

Tip: Hold your mouse pointer over an item that is too wide for the display area to see its full name in a “fly-out.”

Program Properties

The following items are available in the Program section of the **Properties** dialog box. At this point you may not recognize all the options that are being presented to you. As you familiarize yourself with Membership PLUS you're likely to discover many behaviors and appearances that you'd like to customize or modify. The Program **Properties** should be the first place you look.

General

Specify your preferences for the appearance or suppression of several general items. General program properties are stored "locally," so if you and a user on another computer are using Membership PLUS over a network, each of you can specify your own preferences.

- **Set Family Indention Value**

  The Family Indentation Value field allows you to specify how much to indent the names of individuals under their family name in the Member Browser list
- **Save Grid Layout**

  Saves the Customized Grid Layout specified by the user
- **Automatically Edit Records**

  Program changes to "Edit" mode when user begins adding data or making changes to data.
- **Save Desktop on Program Exit**

  Desktop Configuration is saved upon exit so the next time the program is opened, the desktop configuration remains.
- **Show Date and Time on the Status Bar**

  The date and time will appear in the bottom right of the program status bar.
- **Show Backup Data Reminder at Program Exit**

  A Backup Reminder will appear when the program exits.

Default Data Set Path

Specify the default location for storing your data. If you'll be running Membership PLUS over a network and accessing a central database on your server, you should enter the complete path to the data on the server. (The server must be mapped as a network drive, with a drive letter.) Click the Browse button to locate the correct directory, if necessary.

Sample Data Set Path

Enter the path where the sample data is stored. This location was set during program setup. However, if you have created your own "practice" data set, you might want to enter that path here in place of the path to the program-supplied data set. That way you'll have easy access to your practice data set

Data Set Properties

The following items are available in the Data Set section of the **Properties** dialog box. It's very important that you properly establish as many data set properties as possible before you begin entering records. Type directly in any fields provided in the pane on the right (or mark check boxes or radio buttons), or click the **Add button** to open a dialog box to add an item to a list.

Tip: If you're converting data from a previous version of Membership PLUS, you'll need to perform the conversion first, then open the **Properties** dialog box to verify, add, and "clean up" your data set defaults.

International

Specify the formats you desire for phone numbers, ZIP or postal codes, and Social Security numbers. Membership PLUS will try to format your data as you enter it. For example, if you select the (555) 123-4567 phone format, the program will add the parentheses and dash in the correct places. 4023333075 automatically becomes (402) 333-3075.

Members

Indicate your preference for each of these member-related items.

- **Address Defaults—**Specify pieces of address information that are common to most or at least many of the member records you will enter. For example, if most of your members live in Omaha, you would enter that in the City field here. When you add new members to your database, the common address fields are completed automatically.
- **Display Name**—Enter your preferences for the "displayed name" of your family and individual members.
- **Families—**Enter the prefix and suffix to be used when adding family records. For example, your prefix could be The and your suffix, Family. When you enter a new family record by entering the last name (such as Smith), Membership PLUS creates the record as The Smith Family.
- **Titles—**Indicate your preference for whether the personal title (such as Mr. or Mrs.) should be added automatically to the mailing label name when creating new individual records.
- **Status Types**—Enter labels for the different statuses that a member can hold within your organization, such as Active, Inactive, Visitor, Prospective, or Former. Status types are mutually exclusive for any member. A member cannot be both Inactive and Former, for example.
- **Marital Types—**Enter labels for the types of marital status you want to track within your organization—Married, Single, Widowed, or Divorced, for example.
- **Gender Types—**Enter labels for the types of genders you want to track. For most organizations, Female and Male are adequate.

Tip: When you enter status, marital, and gender types, use the Move Up and Move Down buttons to arrange your entries in order of frequency used. Put the most frequently used item at the top of the list.

- **Date Fields**—Enter labels for any dates or events you want to track for a member. For example, many churches and service organizations like to know members' birthdays and when each member joined.

  In addition to specifying a label such as Birthday, you can indicate the types of members to which the date applies. Only individuals have birthdays, for example—not families or organizations.

  You'll also want to specify the default format for the date—for birthdays you may want the full month, day, and year, but tracking the date a member joined your organization may require only month and year.

  Date fields can be used to track both past and future events. If your group has high school and college student members, for example, you may want to track anticipated graduation dates for them.

- **User Fields**—Membership PLUS stores a great deal of information, but every organization has its own special needs. You can create your own fields to track any information not accounted for elsewhere in the Membership PLUS database. If each member of your organization has a unique Member ID, for example, add a user field to track it.

  When you add a user field, you can specify the types of members to which the item applies. You also can customize the type of field created for the information you're trying to track:

  - **Text**—Use this type of control if you want to be able to type anything in the user field. The possibilities are virtually unlimited.
  - **Combo Box**—Select this type of control, and click the List button, to specify allowable entries for the field. Using combo boxes for some types of user fields can enforce consistency of data entry over time. You might use a combo box user field to track the school that each child in your membership attends.
  - **Check Box**—Use a check box control if the information you want to track can be answered with a simple Yes or No? Question. For example, if you want to keep track of which members know CPR, you could create a check box user field. Either an individual knows CPR, or he doesn't.
  - **Number**—Use the number format if all data for the user field will be numeric. If your Member IDs are numeric rather than alphanumeric, use this type of field.

  Understanding these types of user fields, and selecting the most appropriate type for each new user field you create, will help you get the best possible benefit from the data you're trying to track. Data entry will be easier and the data will be more accurate and consistent, as well.

Tip: Before you create a user defined field for something you want to track about your members, make sure it's not something for which Membership PLUS already provides a place for your entry.

- **Note Types**—Enter labels for the types of notes that will be kept for your membership. The minister might want to make notes about counseling sessions, for example, so you'd add Counseling as a note type.

  Unlike the other lists of labels (which allow you to add an unlimited number of items), note types are limited to the five notes established by the Membership PLUS program (no more, no less). You can edit the labels so that they are more descriptive, but the labels are position-sensitive and you cannot rearrange them in a different order. The labels you specify correspond to the five pages of notes available in the Member Notes module.

  Tip: Each note type can be protected separately via limited access rights, if necessary or desired for security or privacy reasons.

- **Contact Labels**—Enter labels for the types of contact information you'll be tracking. Generally the label will be a location, such as Home or Work; then specify the types of contacts available at this location—Voice, FAX, Pager, Email, or Web Site

  Each combination of label and type of contact creates a separate contact field for which you can enter data; if you enter Home and mark both Voice and Email, the fields Home (Voice) and Home (Email) are created. When you enter data for a specific member, you can select exactly which contacts are appropriate for the individual, family, or organization.

- **Family Roles**—Enter roles you want to record for individuals within a family. For example, you might want to specify who are the Father and Mother within a family. Child roles could be simple and general (Child), gender-specific (Son and Daughter), or chronologically based (Oldest Child, Middle Child, and Youngest Child)—or some other plan—depending on the information you want to track about the members of your organization.
- **Default Picture Path**—Enter the path to the directory where files of member pictures will be stored. Click the Browse button to locate the correct directory, if necessary. Specifying the default path here will make it easier and quicker to locate the files when you attach member photos to their records.

Groups

Enter labels for the roles that each member can have within a group. Examples might be **Student** and **Teacher**, if you use groups for Sunday School or other classes, or **Member**, **Chair**, and **Secretary** for a committee-type group.

Group roles are mutually exclusive for any member in a specific group. That is, a member cannot be both student and a teacher of a group.

Meetings

Enter labels for the attendance codes appropriate to the way your organization tracks attendance at meetings. (Meetings can include Sunday School classes, committee meetings, or even your regular worship service).

Visitation

Enter the types of visitation responses that you want to track.

Financials

Indicate your preference for each of these financial-related items.

- **Fiscal Year**—Indicate the end of the fiscal year used by your organization.
- **Pledges**—Enter the appropriate day of the week on which to base weekly and biweekly pledges. Although there are 52 weeks in a year, there are 53 of some days of the week each year—and it's a different day of the week each year. If your pledges are based on your Sunday service, select Sunday.
- **Funds**—Indicate whether you want to display funds using account numbers rather than their names.
- **Contributions**—Indicate your preferences for these options that affect the flow of contribution data entry. Use the Start at Date Field option if the date needs to be considered separately for each individual contribution that is entered. The Require Batch IDs option controls whether or not a batch ID must be entered to create a valid contribution record.
- **Currency**—Enter labels for the types of currency in which your contributions are received. Check and Cash are typical examples.

> **Tip**: Just like other lists of labels indicated earlier in this section! you'll want to use the Move Up and Move Down buttons to arrange the labels in the best order to speed data entry.

- **Contributors**—Indicate whether envelope numbers can be alphanumeric instead of strictly numeric and whether to display contributors by envelope number rather than by name. Also indicate which types of members can pledge and/or contribute.
- **Deposits**—Indicate the financial software, if any, to which you will export deposit information, and enter the complete path to that software's corresponding data files for your organization. Use the Browse button, if necessary, to locate the file or directory.
- **Register (GL)**—Reminders can be set for auto transactions and when checks are to be printed. Indicate whether to defer posting checks until after they are printed. Choose to have the program automatically add account numbers.

Organization

Indicate the name of your organization, contact information, and your organization's address. The organization name you enter here will appear in the program's title bar; other information can be used in reports.

Membership PLUS Modules

Module Basics

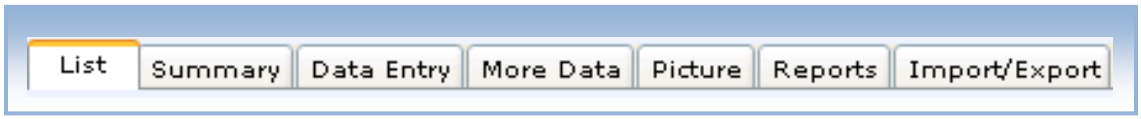
Information entered into Membership PLUS is organized into categories called modules. Each time you need to enter or retrieve information, use the module that best describes your information. For example, information about contributions is entered in the Contributions module, and attendance at meetings in entered in the Meetings module.

To open a module

Click the corresponding button on the Modules bar on the left of the Welcome Screen, or from the Modules menu on the menu bar. Each module opens in its own window. You can have more than one module open at the same time.

Module Pages (Tabs)

Each module in Membership Plus tracks more information than can be shown on the screen at one time. Similar information for each module is grouped together and displayed on its own page (tab). Available pages for each module are indicated by the tabs at the top of the module window. (Tabs will differ depending on the module).



To move from page to page, click the tab for the information you want to view, add, edit, or print or click the tab for the task you want to perform.

Tip: The current page is indicated by a raised tab at the top of the screen.

Members and Financials Module Pages (Tabs) Descriptions

List Tab

- Displays a list of all of the records that have been entered.

Summary Tab

- Displays information for the record selected on the List Tab.

Data Entry Tab

- Add new record information or edit existing record information.

Picture Tab *(Families, Individuals, Organizations, Member Browser modules only)*

- Displays a picture of the member record selected on the List Tab and allows adding, editing, and deleting of pictures.
  - To add a picture, click on the add button at the bottom of the page. A browser will open so you can locate the member's picture.
  - To edit a picture, click on the edit button at the bottom of the page. Your default Image Editor will open the picture for you to make adjustments.
  - To delete a picture, click on the clear button at the bottom of the page.
  - To select a default Image Editor, click on the Choose Image Editor button at the bottom of the screen. A browser will open so you can select your default image editor program.

Reports Tab

- Displays member reports. (Limited filtering and date range options available)

Import/Export & Data Export Tab

- Allows you to import and/or export information from or to other locations/programs and synchronize information between Membership PLUS and Microsoft Outlook.

More Data Tab *(Member Browser module only)*

- Displays attendance, contribution, and pledge information for the member record selected on the List Tab.

Meeting Tab *(Small Groups module only)*

- Add, edit or display small group activity history and attendance information.

Prospects Tab *(Visitation module only)*

- Record information about prospective members and list visits to and from those

Visits Tab *(Visitation module only)*

- Record specific details about visits with prospective members.

Detail View Tab *(Deposit module only)*

- Displays basic or summary information about each deposit.

Contributions Tab *(Deposit module only)*

- Displays details of the contributions that make up the deposit.

Working with Records

Adding, Modifying/Editing and Deleting a Record

The basic procedures for adding, modifying, and deleting a record are the same from module to module.

To add a record:

1. *Click the **Add button** on the Lists tab/page. This will take you to the Data Entry tab/page.*
2. *Enter the necessary information in the appropriate fields.*
3. *Click the Save button.*
4. *Click the **Cancel button** to not add the record.*

To modify a record:

1. *From the List tab/page, select the record.*
2. *Click the **Edit button** or select the Data Entry tab/page if you have set your properties to automatically edit records.*
3. *Make the necessary changes/additions.*
4. *Click the Save button.*

To delete a record:

1. *From the List tab/page, select the record.*
2. *Click the **Delete button***

	Some records cannot be deleted until other related information is deleted. *Member records cannot be deleted if they have a corresponding pledge or contribution record.*

Moving from a module to related information

Membership Plus data is interconnected in many ways. While viewing data in one module, you can move to related information in another module. For example, if you're working with individual records, you can view the related family record or notes for a specific individual. (Choices vary, depending on the module that is active).

To view related information:

1. *Click the **Go To** button at the top of the module window*
2. *Select the desired option from the pop-up menu.*

Printing from a Module

Printing from within a module occurs on the Summary and Reports pages of most modules.

To print from a module:

1. *On the Summary page, click the **Print Button**.*
2. *On the Reports page, first select a report from the Reports drop down menu and then click the **Print Button**.*

Membership Tracking

This section will list the Membership PLUS Members modules and the definition and concepts of each.

Members Modules

Membership PLUS revolves around members. At its simplest level, a member is anyone who belongs to, attends, or contributes to your church or organization.

Families, Individuals, and Organizations

In Membership PLUS, there are three types of members:

Families—a family is a collection of related people or a collection of people who share the same address. A family can have individuals linked to it or not, depending on the information tracked and the results required.

Individuals—an individual is any one person and can be categorized as a guardian or dependant. A guardian is someone who heads a household. A dependent is anyone who is not a guardian. For example, both parents might be designated as guardians. Children generally are designated as dependents.

Individuals can be linked to families, or an individual record can stand on its own. (Each individual can be related to only one family).

Organizations—an organization is a business, another church or service group, or any other “non-person” entity.

Membership PLUS will also track people or businesses that may not technically belong to your church or organization, such as visitors, guest speakers, individuals or families who have moved away, contributors, missions, etc. Many customized features are available for this reason: For example,

- Each member in your database can be assigned a status type, such as Active, Inactive, Visitor, Prospect, Friend, Contributor, etc. These status types are searchable so that reports, letters, e-mails, and labels can be generated for one or more of a specific status type.
- You can use the visitation module to track visitors and prospects and manage your correspondence with them.

Member Browser

The Member Browser module displays a variety of information about the members of your church or organization, including their attendance and financial records.

Groups

In Membership PLUS, a group is a collection of members (of any type) drawn together for a specific task or because of a certain trait (i.e., a certain age, all participate on a certain committee, all have children that attend Sunday School, a Newsletter mailing list, etc.). A group does not have a mailing address nor can a group make a contribution or pledge.

A Group can be created to represent one of the following classifications:

Class - Groups that meet on a regular basis and may or may not be instructional, such as Sunday School, Bible Study, Worship Services, Choir, Youth Group, Nursery, etc. (You can use Membership PLUS Meetings to track these class meetings and corresponding attendance.)

Committee/Ministry – Groups that meet and perform basic organizational functions, such as the Financial Committee, Steering Committee, Men's Ministry, Outreach, etc.

Skill Gift/Interest - Groups created for people who don't to meet but who have something in common, such as widows and widowers, musicians, college students, singles, senior citizens, blood donors, athletic groups, etc.

List Groups – Groups created to organize some members into a "list" to make it easier to send mailings, e-mails, or phone chains, such as the weekly or monthly newsletter, prayer chain, disaster relief, etc.

Other – Groups that don't fit any of the other descriptions.

In Membership PLUS, each member of a group is assigned a specific role, making it easy to distinguish the leader from the members or the teacher from the students. These roles are also useful for reporting.

Supergroups and Subgroups

Membership PLUS also allows supergroups to be created. A supergroup is a "group of groups." For example, a supergroup might be Sunday School, with each Sunday School class being a subgroup of the supergroup. The additional layer of structure can make tracking and reporting easier in situations where this structure applies.

Small Groups (Deluxe Edition)

Small Groups are one of the most effective ways to decentralize and organize church membership groups today.

Use the Small Groups module to record and view small group information. You can track group members, members' roles, contact information, meeting times/days, locations, leaders, activities, and keep attendance history on each group member.

Visitation

You'll use the Visitation module to track information on your prospective members as well as the visits to and from those prospects.

Member Notes

Record and view notes for all member record types. You can access the Member Notes module from the Members submenu under the Modules menu or from the **Go To** option on the menu toolbar when In Individuals or Families.

Member Pictures

The Member Pictures module displays pictures or images that have been attached to member records. You can access Member Pictures from the Members submenu under the Modules menu or from the **Go To** option on the menu toolbar when In Individuals or Families. This module is for viewing pictures of your entire church or organization.

To add, edit, or delete member pictures, go to the Pictures Tab in the Families, Individuals, or Organizations modules.

To add a picture to a member:

1. *From the List Tab, select the member.*
2. *Move to the Picture tab/page.*
3. *Click the **Add button** at the bottom of the page. A browser will open so you can locate the member's picture.*
4. *Select the picture.*

To edit a picture of a member:

1. *From the List Tab, select the member.*
2. *Move to the Picture tab/page.*
3. *Click the **Edit button** at the bottom of the page. Your default Image Editor will open the picture for you to make adjustments.*

To delete a picture of a member:

1. *From the List Tab, select the member.*
2. *Move to the Picture tab/page.*
3. *Click the Clear button at the bottom of the page.*

To select a default Image Editor:

1. *Move to the Picture tab/page.*
2. *Click the Choose Image Editor Button at the bottom of the page. (A browser will open) Select your Image/Picture editor program.*

For more detailed assistance on how to use all features, see Membership PLUS Help, visit the Website at www.memplushome.com, or contact Support at 843-413-8334.

Financial Tracking

This section will list the Membership PLUS Financial modules and the definition and concepts of each.

Financial Modules

Nearly every church, organization, and service group depends on contributions to survive. Whether in the form of donations or membership fees, these funds keep the doors open and the lights on. Membership PLUS tracks pledges, contributions, and deposits and offers a variety of reports to distribute, analyze, or project.

Contributions and Pledges

A *contribution* is a one-time gift of money. Contributions may be designated for certain uses or for general operating purposes— in other words, a contribution is given toward a fund.

A *pledge* is a promise to give a certain amount of money over a designated period of time. In most cases, a pledge is expressed as dollars per week or month for a specified time frame. A pledge also is made toward one of your organization's funds. It's very common, for example, to have members pledge toward the New Building Fund before the organization can commit to breaking ground.

As contributions are entered, indication can be made as to which pledge the contribution is to fulfill.

Deposits

Money contributed to your church or organization is deposited in a bank. In Membership PLUS, a deposit is a collection of contributions that corresponds to a bank deposit. Whatever your deposit schedule, a deposit can be tracked both in Membership PLUS and in your accounting or financial management program.

Deposit records can be exported from Membership PLUS for import into Quicken or QuickBooks from Intuit. Creating deposit records in Membership PLUS can help with bank reconciliation by tracking the detail of exactly which contribution receipts are included in which bank deposit.

	Deposits are a requirement for the periodic archiving of financial data, generally a year-end procedure.

Banks

Use the Banks module to record and view information about the bank accounts into which contributions made to your organization are deposited. (More than likely you won't use the Banks module very frequently after initial setup.)

Funds

A fund is a sum of money or other resources designated for a particular purpose. The use of funds lets your organization track your members' desire for how the money they give to your organization is to be used.

A fund can be as general as General Fund (for unrestricted contributions or money donated to cover general operating expenses) or more specific, like Building Fund, (money donated towards the costs associated with a new building).

You'll set up funds in your data based on members' designated pledges and contributions, taking into consideration how you wish to track giving records or income. As a starting point, Membership PLUS funds should mirror the income accounts in your financial accounting data.

Contributions @ Home

Contributions@Home gives you the flexibility of taking a subset of a data set home where you can add contributions and members. You can bring it back to the church and merge the subset into the full data set. See Membership PLUS Help on how to use this feature.

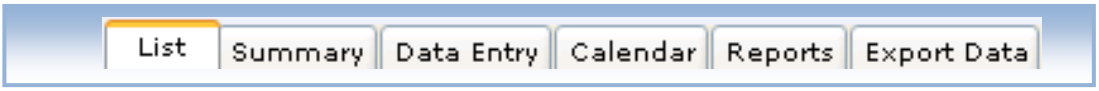
Accounting

The Accounting Modules are available only in Membership PLUS Deluxe edition. See the Membership PLUS Getting Started with Accounting Manual and Membership PLUS Help for more information and details on how to use the Accounting Modules.

For more detailed assistance on how to use all features, see Membership PLUS Help, visit the Website at www.memplushome.com, or contact Support at 843-413-8334.

Module Pages (Tabs)

Available pages for each module are indicated by the tabs at the top of the module window. (Tabs will differ depending on the module).



Schedule, Surveys, and Workflow Module Pages (Tabs) Descriptions

List Tab

- Displays a list of all of the records that have been entered.

Summary Tab

- Displays information for the record selected on the List Tab.

Data Entry Tab

- Add new record information or edit existing record information.

Calendar Tab

- Offers three options on how to view records: 3 day view, week view, or month view

Reports Tab

- Displays member reports. (Limited filtering and date range options available)

Import/Export & Data Export Tab

- Allows you to import and/or export information from or to other locations/programs and synchronize information between Membership PLUS and Microsoft Outlook.

Process Tab *(Auto Tasks module only)*

- Provides access to all your auto tasks

Properties *(Calendar module only)*

- View, add, or edit calendar information

Day View *(Calendar module only)*

- Displays one specific day's events and dates

Multi-day View *(Calendar module only)*

- Displays three specific days' events and dates

Week View *(Calendar module only)*

- Displays a specific week's events and dates

Month View *(Calendar module only)*

- Displays a specific month's events and dates

Printout Tab

- Print, email, or export a survey.

Setup Tab

- Allows you to create a new survey, or edit an existing survey.

Questions Tab

- Allows you to enter questions for a specific survey.

Enter Results Tab

- Allows you to enter results for a submitted questionnaire into the database.

View Results Tab

- Displays questionnaire results in a report format.

Select Steps Tab

- Create Workflow Wizards to combine data entry screens, reports, and data tools into a step-by-step process for easily entering data.

Set Order Tab

- Provides the ability to specify the order in which steps occur in the wizard.

Working with Records

Adding, Modifying/Editing and Deleting a Record

The basic procedures for adding, modifying, and deleting a record are the same from module to module.

To add a record:

1. *Click the **Add button** on the Lists tab/page. This will take you to the Data Entry tab/page.*
2. *Enter the necessary information in the appropriate fields.*
3. *Click the Save button.*
4. *Click the **Cancel button** to not add the record.*

To modify a record:

1. *From the List tab/page, select the record.*
2. *Click the **Edit button** or select the Data Entry tab/page if you have set your properties to automatically edit records.*
3. *Make the necessary changes/additions.*
4. *Click the Save button.*

To delete a record:

1. *From the List tab/page, select the record.*
2. *Click the **Delete button***

	Some records cannot be deleted until other related information is deleted.

Moving from a module to related information

Membership Plus data is interconnected in many ways. While viewing data in one module, you can move to related information in another module. For example, if you're working with individual records, you can view the related family record or notes for a specific individual. (Choices vary, depending on the module that is active).

To view related information:

1. *Click the **Go To** button at the top of the module window*
2. *Select the desired option from the pop-up menu.*

Printing from a Module

Printing from within a module occurs on the Summary and Reports pages of most modules.

To print from a module:

1. *On the Summary page, click the **Print Button**.*
2. *On the Reports page, first select a report from the Reports drop down menu and then click the **Print Button**.*

Schedule and Resource Tracking

This section will list the Membership PLUS Schedule modules and the definition and concepts of each.

Schedule Modules

Meetings

Record meetings, take attendance and capture member information involvement within your church or organization.

Auto Tasks

Set up specific follow-up tasks to occur automatically in Membership PLUS based on certain actions that happen in the program. Schedule a follow-up email/letter/phone call whenever a new member is added, or an address changes. These tasks can be assigned to specific users, with a specific due date, and can be viewed on the Welcome screen.

Event Registration

Event Registration allows you plan and manage special events at your church or organization. Through this module, you can track registrations, attendees, costs and fees, and produce special reports such as registration invoices, name badges, tasks lists, attendee lists and more.

Calendar

Keep track of important dates about your members (like birthdays or anniversaries) and Church events. A reminder feature ensures that you can always keep your Church informed and up-to-date about all events.

Room & Equipment Scheduling

Organize and manage your rooms and equipment resources such as the Fellowship Hall, kitchen, gymnasium, conference rooms, audio visual equipment, furniture, supplies, and more.

Equipment Inventory

Equipment Inventory Module that simplifies the task of keeping detailed information of all the Churches assets such as vans, audio/video, furniture, etc. Through this module, you can also keep track of equipment maintenance records.

Surveys and Workflow

This section will list the definition and concepts of the Survey and Workflow Wizard module.

Survey Module

The Survey Module provides you a great way to create, deliver, and analyze surveys to gather information about your members. By utilizing Membership PLUS to manage your surveys, you can develop a deeper, more meaningful understanding of your congregation's needs.

Survey Module Pages/Tabs

List Tab

- Displays a list of all current questionnaires

Printout Tab

- Allows a printout of a survey for hand delivery

Setup Tab

- Allows the setup of a new survey

Questions Tab

- Allows entry of questions for a specific survey

Enter Results Tab

- Allows questionnaire results to be entered

View Results Tab

- Displays questionnaire results in a report format

Workflow Wizard Module

The Workflow Wizard can help you accomplish key tasks (i.e., entering a new user, entering a new contribution) that usually involve multiple steps. Through the wizard, these steps are consolidated into a single new window for easy data entry.

Workflow Wizard Module Pages/Tabs

List Tab

- Displays a list of all current wizards

Steps Tab

- Specify which steps are to be included in the wizard

Order Tab

- Specify what order the steps occur in the wizard

Reporting

This section will list the Membership PLUS Reporting modules and the definition and concepts of each.

Reports Modules

Report Generator

Generate reports from your member and financial data. Users can produce colorful pie, bar, or line graphs for professional presentations. Email reports to any member, group of members, or non-members. Send reports as file attachments, zip files, or directly in the body of email.

Report Generator Module Pages/Tabs

Options Tab

- Select records/accounts to include in the report

Filter/Sort Tab

- Select the filters and sorting options for the report

Format Tab

- Select the formatting options for the report

Preview Tab

- Select result preferences such as single item reporting and date ranges.
- Select report generation method such as preview, print, e-mail or export.

To produce a report in Report Generator:

1. Open Report Generator
2. In the tree view on the left side of the window, open the appropriate report folder by clicking on it. Select the desired report.
3. Enter the report requirements on the Options, Filter/Sort, and Format pages.
4. Select the Preview page/tab.
5. Select your preferences.
6. Preview, print, e-mail, or export the report.

To access the Report Builder Wizard:

	The Report Builder Wizard is recommended for advanced users of Report Builder.

1. Open Report Generator
2. In the tree view on the left side of the window, right click and select New Report. The Report Builder will open.
3. Select File, then New from the menu bar.
4. Select Report Wizard in the New Items window.
5. Follow the instructions in the window.

For more detailed assistance with the Report Generator module, see the Getting Started with Report Generator Tutorial at www.memplushome.com/gettingstarted, see Membership PLUS Help, or contact technical support at 843-413-8334.

Quick Letter

Use this built-in word processor to merge data from your member records and personalize correspondence.

Quick Letter Module Pages/Tabs

List Tab

- This tab displays a list of your documents.

Edit Text Tab

- This tab allows you to create or change the text of a previous letter.

Merge Options Tab

- This tab allows you to decide member type merges, dates ranges, filters, and sort orders of your letters that you would like to merge together.

Email Setup Tab

- This tab allows you to set up and send emails through the Quick Letter program and Membership PLUS reports.

Mail Merge Tab

- This tab allows you to merge letters together for mailing. You can also print, email, or export the letter.

Labels/Envelopes Tab

- This tab allows you to create or edit labels and envelopes for mailing.

To create a new document in Quick Letter:

1. From the List Tab, click the **Add button** on the toolbar.
2. Click on the New Letter text and enter the title for the document.
3. Click on the Edit Text tab to enter text for the document.
4. Click the Save button.

To add an existing document in Quick Letter:

1. The existing document must be RTF, HTML, or TXT format.
2. From the List Tab, click the Load button at the bottom of the page.
3. Use the Load Document dialog to browse to the document you want to add.
4. Select the document and click on the Open button.
5. The document will appear in the grid on the List Tab.

To open a document:

1. From the List tab, select the letters/document to open.
2. Double click the letter/document.

To save a document for use in the future:

1. On the toolbar, click the Save button.
2. Enter a name for the document and indicate the path where the file is to be saved.
3. Click Save.

	Quick Letter documents can be saved in the following formats: TXT, RTF and HTML.

Pictorial Directory

You can use Pictorial Directory to compile a photo directory of your membership. If you already have images attached to members in your data set (through use of the Member Picture module), the Pictorial Directory makes use of that information. If not, pictures can be attached to member records using the Pictorial Directory.

Pictorial Directory Module Pages/Tabs

List Tab

- Displays a list of all of the pictorial directories that you have entered.

Reports Tab

- View, print, export, or email the directory.

Pictures Tab

- Attach a picture to a member.

Captions Tab

- Enter captions for your pictures.

Layout Tab

- Make page layout adjustments and print your pictorial directory.
- Set print options, print orientation, margins, and file export options.

To Add a new Pictorial Directory:

1. Click the **Add button** at the bottom of the page.
2. On the New Pictorial Directory dialog, enter the title and choose a data set.
3. Click OK

To Copy a Pictorial Directory:

1. Click the Copy button at the bottom of the page.
2. On the Copy Pictorial Directory dialog, enter the title and choose a data set.
3. Click OK

To Add a picture to a Pictorial Directory:

1. Click either the **Add button** or the **Add Wizard button** above the Member List field on the right of the screen.
    a. Clicking the **Add button** gives you two options: Select a member from your data set OR Add someone not in the data set.
    b. The **Add Wizard** gives you step by step instructions on how to add member(s) to the Member List field.
2. Once the member has been added, use the browse button under the **File Name** section to locate the member's picture.
3. To add a caption, click the A**dd button** on the tool bar. To edit a caption, click the **Edit button** on the tool bar.
4. Use either the Auto-insert common fields or Manual insert fields to add to your caption or design your own caption

For more detailed information on how to use the Pictorial Directory module, please see the Membership PLUS Help files or contact Membership PLUS Technical Support at 843-413-8334.

Progress Tracker

Use Progress Tracker to set up goals and to track them through a specific time frame, and then view the progress throughout. This can be used for everything from financial goals like a building campaign, to membership goals, to attendance goals, to baptism/confirmation goals. You can set up each goal to have an unlimited number of milestones along the way (100 new members this year, 50 of them by June). You can also view Projections for each goal (how many new members you'd have to average each week/month to reach the goal), and can view the progress on a variety of charts and graphs.

Progress Tracker Module Pages/Tabs

List Tab

- Displays a list of all the goals entered

Summary Tab

- This tab allows you to create graphs to visually follow the progress of your goal.

Data Entry Tab

- Enter required information for the established goals in the appropriate fields.

Projections Tab

- This tab is the report tab for the Progress Tracker module. The projection analysis displays what must take place to accomplish the goal.

Administration Modules

For more information and/or how to use any of the Administration modules, see Membership PLUS Help or contact Membership PLUS Technical Support at 843-413-8334.

Program Properties

Program properties are items that affect the way the program behaves or appears. See the Program Properties (Defaults) section of this manual.

Global Search & Replace

The Search & Replace feature provides you with a method to change large amounts of data throughout your data set.

Policies & Procedures

With this feature, you can enter the policies and procedures that your organization follows when entering data into Membership PLUS. This information can be helpful to you or others in your organization who works in Membership PLUS.

Membership PLUS QuickView (Deluxe)

Membership PLUS QuickView is a small application that runs in the background as you work at your computer. It gives you quick access to the member information and calendar events in Membership PLUS without the need to launch Membership PLUS itself. This module is great for volunteers!

To open MP QuickView:

1. Click on the **Start button** on your computer's status bar.
2. Choose Programs, then choose Membership PLUS then choose Membership PLUS Version 11 QuickView
3. To open Membership PLUS QuickView, click on the MPQuickView icon on the status bar of the Windows desktop

Program Help

The primary source of information about using Membership PLUS is the Program Help.

To access Membership PLUS Program Help:

1. Click on **Help** from the Menu bar.
2. On the drop-down menu, click on either **Help Topics** or **Index**
    a. **Help Topics** will display Membership PLUS Help with Table of Contents
    b. **Index** will display Membership PLUS Help with the topic index.

Press **F1** to open a Help topic relevant to your location in the program. If the first topic you reach isn't what you want, click the **Contents**, **Index**, or **Find** tabs in the Help window to look up more information using the Help topics dialog.

Internet Help

Visit www.memplushome.com for the latest information, training, knowledge base, e-mail support, and updates covering Membership PLUS!

Technical Support

Registered customers only can receive technical support.

To help you get up and running or to address any questions you may have, we offer phone support, email support, and online support. Email and online Technical Support can be accessed by going to www.memplushome.com/support.